

Check Screens and Lists of Approved Stores

PowerPoint Presentation:

- Check Screens and Lists of Approved Stores



Learning Objectives:

By the end of this section you will have:

- Previewed the new check screens in Client Services
- Analyzed how the changes will affect services in the clinic
- Identified how to locate and use the List of Approved Stores



CHECKS, STORES, AND MORE

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Check Screen Highlights

(PowerPoint slides 3 and 4)

What is the new look for the Check Pickup screen?

Print | Notes | Results: Clients | Results: Checks

Client: Day, Apple A Client ID: 115017691 ☐ See Notes View

Caregiver: Day, Fiva A Age: 2 Yr 5 Mo Print

Client Name	Category	Food Pkg	Last Checks Issued
Day, Apple A	C	C101 - 3	August 2006
Day, Broccaflower A	I	I108ENF - 2	August 2006
Day, Tangelo A	C	C101 - 3	August 2006

☒ Print Group ☐ Print Individual

☐ Monthly ☒ Bi-Monthly ☐ Tri-Monthly

Food Package: C101-Fluid Milk, 1 # Cheese # Cks: 3

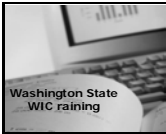
Check Message: Babies were born to be breastfed

Check Pickup Screen

Activity:

Take a moment to write down what you notice about the Check Pickup screen.

What's removed?	What's added?



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Check Pickup Screen Highlights: (PowerPoint slide 5)

- The Retailer column has been removed from the check information section in the middle of the tab.
- The Retailer selection lists have been removed from the bottom of the tab.
- The Any Authorized Retailer check box has been removed. All checks will automatically print to Any Washington WIC Approved Store.
- A Check Message selection list has been added below the Food Package selection list. Currently the only message available is "Babies were born to be breastfed."

Note: The state WIC office will create and manage the list of messages, local staff select the message they'd like to print on the checks.

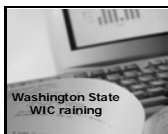
- Light lines have been added between the Print Group, Print Individual option and the Monthly, Bi-Monthly and Tri-Monthly sections of the screen.

Food Package Information: (PowerPoint slide 6)

No additions or changes have been made to the food packages or food package defaults with this version of Client Services. A full "remodel" of the food package drop-down lists will be done in the future to make finding and selecting a food package easier.

Known Issues – Refer to your Release Notes for additional information.

- There are a few instances when Infant food packages show in the dropdown list of food packages when the category of the client is a child. This should not occur and will be fixed. Do not select an I food package for a child, rather select one of the Special S or SX food packages when a child needs formula.
- There are also some cases when the I800 food packages, infant packages with more juice, will show. These do not display consistently in the food package lists and should not be used at all.



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Void and Replace Screen Highlights: (PowerPoint slides 7, 8, 9 and 10)

How often do you typically void and replace checks in the clinic?

What is the main reason you void and replace checks?

The Void and Replace wizard works in Client Services 4.3 as it did previously. With all checks printing to any WIC approved store, checks do not need to be voided and replaced for store changes.

These are the changes to the Void and Replace Checks screens:

- The retailer selection list has been removed from the Replacement Criteria tab. The Replacement Criteria tab will only be available when the food package can be changed for replacement checks.
- All replacement checks are printed to Any Washington WIC Approved Store, just like the regularly printed checks.
- Checks printed through this wizard have the words "Replacement Check" printed between the Actual Purchase Price and Benefit Month/year. This feature helps clients/caregivers identify which checks are the originals and which are the replacements. Once replacement checks are issued, the originals should not be used.

WASHINGTON STATE DEPARTMENT OF HEALTH
P.O. BOX 47886 OLYMPIA, WA 98504-7886
1-800-841-1410

Southern National Bank 64-1968-611 1150710735

Client ID#: 115017716 Name: Time, Justina
Pay To: Any Washington WIC Approved Store

First Day To Use Jun 02, 2006 Transaction Date Last Day To Use Jul 02, 2006

36 oz. or Less Cereal (See Back of Check)
2 Gallon(s) Fluid Milk, 2% or less fat, fortified
2 Juice (See Back of Check)
1 Dozen Eggs, Large or smaller
1 16/18oz Peanut Butter OR 1lb. Dry Beans/Peas/Lentils

Actual Purchase Price \$970

Replacement Check
June 2006
970

Retailer Stamp ID Here

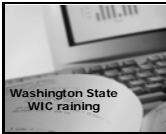
Retailer must deposit this check within 60 days of "First Day To Use"

Customer Signature - Show ID to match name below
X
☐ Time, Justina
☐ XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

11507107356 2501930

Replacement Check

What effect do you think printing checks to "Any Washington WIC Approved Store" will have on how often you will void and replace checks in your clinic?



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Check History: (PowerPoint slide 11)

When checks are printed the Check History window lists the retailer as Any Washington WIC Approved Store.

When Client Services receives the Paid information about a check, it will include the specific store where the check was used. This information is displayed on the Check History window.

Client	Smith, Martie T	Client ID	99596497						
Caregiver	Smith, Martie T	Age	33 Yr						
Issue Date	First Day to Use	Check #	Retailer	Food Package	Seq #	Paid Date	Check Status	Source	Replacement Re
04/14/2006	06/23/2006	1150662830	Any Washington WIC App	W101 - 3	1			On Demand	
	06/23/2006	1150662831	Any Washington WIC App	W101 - 3	2			On Demand	
	06/23/2006	1150662832	Any Washington WIC App	W101 - 3	3			On Demand	
	05/23/2006	1150662801	Mega Foods - Tumwater	W101 - 3	1	06/06/2006		On Demand	
	05/23/2006	1150662802	Mega Foods - Tumwater	W101 - 3	2	06/06/2006		On Demand	

New Check History Window

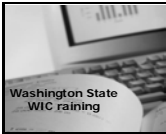
All of the check status codes have remained the same. Just the retailer information has been updated in Client Services 4.3.

Check Status Codes:

L	=	Recorded as Lost/Stolen/Destroyed (and voided)
LR	=	Recorded as Lost/Stolen/Destroyed and Replaced
V	=	Voided
VR	=	Voided and Replaced

Other areas of Client Services where Store/Retailer information has been removed: (PowerPoint slide 12)

- Replace Non-CIMS Checks
- Unvoid Checks – checks list tab
- Record Handwritten Checks
- Site/Preferences – the Retailer section has been removed

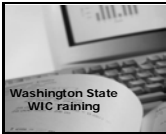


Mailed Checks Letter

(PowerPoint slide 13)

- The Mailed Checks Letter has been updated in Client Services 4.3 to include instructions on how to use Any Washington WIC Approved Store checks.
 - The 7 steps for using WIC checks listed in the letter appear consistently on other client education materials.
- The letter is available in English and Spanish in Client Services.
 - A Spanish letter will print when Spanish is marked for Interpreter on the Demographics tab.
- The letter prints so the address will show in a window envelope when folded.
- The Non-discrimination statement reflects the current version approved by USDA.

An example of the new Mailed Checks letter appears on the next page.



Mailed Check Letter

June 21, 2006

Wendy Wells
123 Foggy St., Apt. H – 6
Pineridge, WA 98001

Dear Wendy Wells,

We don't want you to miss out on getting WIC foods. Because of special circumstances, we are mailing your WIC checks to you. WIC checks are enclosed for:

Wells, Wendy W.

Remember these steps for using your WIC checks:

1. Use your WIC checks on or between the first and last day to use.
2. Use a WIC check only if your name is printed below the signature box.
3. Shop only at WIC approved stores. Look for "WIC Checks Accepted Here" signs.
4. Buy only the amounts and types of foods listed on your WIC checks.
5. Separate your WIC foods by check and from other items you are buying.
6. Let the checker know you are using a WIC check before you begin your purchase.
7. Sign the WIC check after the checker sees your ID and writes in the amount.

Please call clinic staff at the number below for any of the following reasons:

- Questions about your checks or the foods on your checks
- Problems cashing the checks at the store
- To make your next WIC appointment
- To change your WIC appointment

WIC Staff
Raintree CHD – Evergreen WIC
529 W 4th Ave
Olympia, WA 98501
(360) 754-2936

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List of Approved Stores (PowerPoint slide 14)

Helping clients/caregivers find an approved store is very important since WIC checks will not be printed with a specific store name. Although most clients will tend to go to one or two stores, they have the option to shop at any Washington WIC approved store at any time.

Lists of approved stores have been added to Client Services 4.3 to assist clinic staff and clients identify which stores are approved to accept WIC checks in Washington.

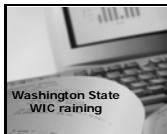
Not every client/caregiver will need or want to have a list of stores provided to them, it is up to the client/caregiver and clinic staff to determine if a list is needed or desired.

Options for informing the client/caregiver about approved stores:

- Ask the client/caregiver where they usually shop, review the list to see if it is an approved store.
- Have retailer lists printed and available to for clinic staff and clients/caregivers review to see what stores in the area are approved.
- Provide a list of approved stores to the client/caregiver as needed or desired.
- Inform the client/caregiver to look for the "WIC Checks Accepted Here" signs. The example below was sent to all Washington WIC Approved Stores, however, stores may choose to create one of their own.



Every clinic has access to the complete list of Washington WIC Approved Stores which can be printed for use in the clinic or provided to clients. Staff can also customize the search for approved stores by zip code, city, county, retailer or "all" and print the list to provide to clients.

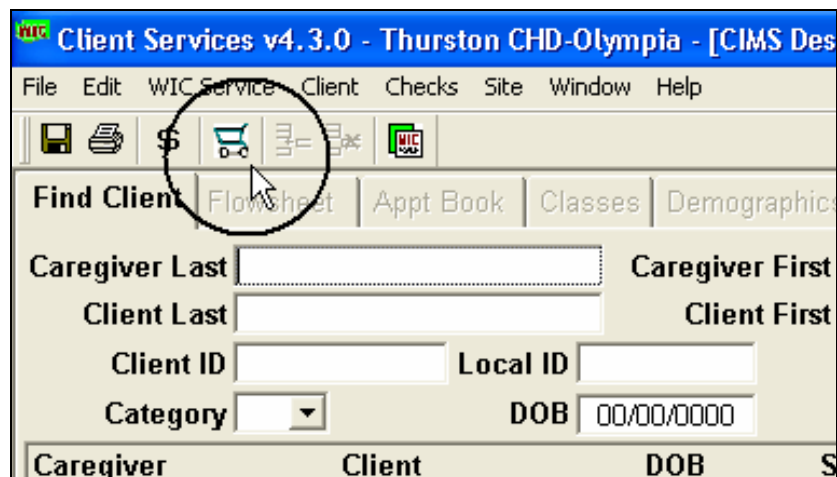


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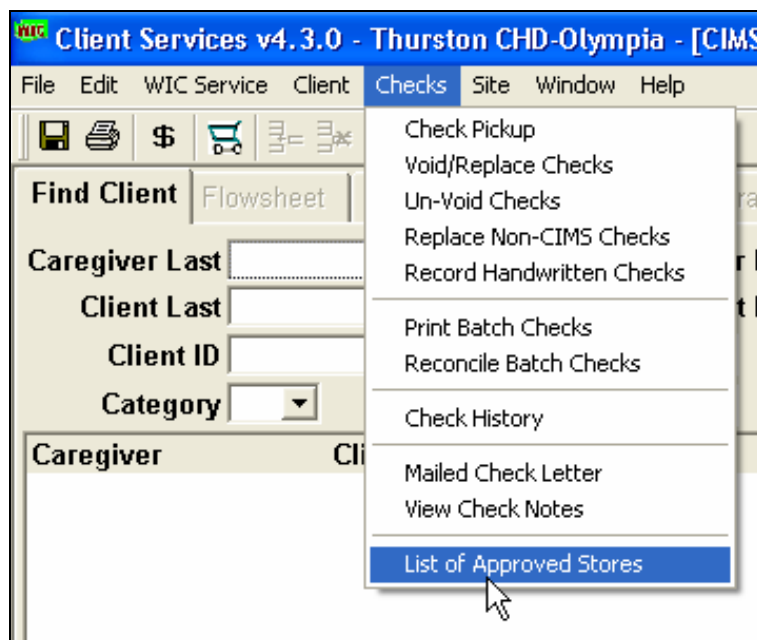
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The List of Approved Stores can be accessed in three places:
(PowerPoint slide 15)

1. The shopping cart icon on the tool bar.
2. The Checks menu (the last item on the drop down list)
3. The Clinic menu in Clinic Reports



Shopping Cart Icon



Checks Menu Option



**Accessing and using the lists of approved stores:
(PowerPoint slide 16)**

1. Access the list of approved stores:
 - Select the shopping cart icon on the tool bar,
 - Select the List of Approved Stores from the Checks menu,
 - Go to Clinic Reports and select Retailer Listing from the Clinic menu.

2. When the window opens, click one of the "Search By" options which include: Zip Code, City, County, Retailer, All.

Zip Code: With zip code selected, type the numbers of the zip code you'd like to search by. If you hesitate while typing in the numbers, Client Services thinks you are finished. The list will show all the stores with the zip code entered in the field.

Note: The search results are based on the store's zip code. A client may live in one zip code, but the store where he/she shops may be in another zip code.

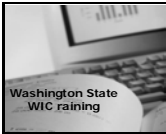
City: With city selected, type the name of the city in the field to find all the stores located in that city.

County: With county selected, enter the name of the county in the field. All approved stores in the county will be listed.

Retailer: When retailer is selected, enter the name of the store in the field. All the WA WIC approved stores with that name will be listed. The list cannot be sorted by two options, for example you are not able to search by retailer and city, only by retailer.

All: This option will produce a list of all the stores that are approved by the Washington State WIC Nutrition Program.

Note: **It is recommended to print an updated "List of Approved Stores" Report at least once a month.** Keep the report with the clinic's QWIC Steps for Handwriting Checks and Food Package Reference Tables.



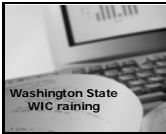
CHECKS, STORES, AND MORE

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3. You can change the listing selection at any time by changing the Search By option.
4. To Print the list of approved stores, click the Print icon on the toolbar.
5. Close the window when finished.

The List of Approved Stores has several features: (PowerPoint slide 18)

- The Search By function does not have a default setting. Local staff requested there not be a default since the most useful search for approved stores may vary from clinic to clinic and from client to client.
 - The store name, address, city, zip code and phone number is displayed and prints on the report. Clinic staff and clients can use this information to locate or contact a store.
 - Stores are listed by the address they submit to the state WIC office. Occasionally a store may be physically located in one city but appears on the list for another city, this happens most often when a city has been recently incorporated.
- Example:** A store is physically located in Lakewood, but the store submitted their address as Tacoma. On the retailer list, the store will appear under Tacoma instead of Lakewood.
- The list can be sorted by clicking on the column headers. If staff search by city, the list will display stores in alphabetical order, clicking on the Name heading will sort the list in reverse order.
 - The list can be printed for clinic use or to provide to a client. Be sure to check the length of the list prior to printing. As you can imagine the "All" list is rather lengthy and will take time to print.



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List of Approved Stores: (PowerPoint slide 19)

Activity:

Take a few minutes to consider these questions.

What list do you think will be most useful in your clinic? (zip code, city, county, retailer, all)

How will you let clients/caregivers know what stores are approved in your area? (verbally, in writing, etc)

What list(s) do you think your clinic might print regularly in case of power outages or emergencies?

